



<http://www.relevantcrm.com/>

Position Title: CRM Consultant

Reports To: Owner and Business Manager

Effective Date of Job Description: July 2011

Purpose of Position:

The CRM Consultant will provide consulting, programming, training, installation and support for clients using Microsoft Dynamics CRM, GoldMine, SalesForce and QuoteWerks and other programs. Prefer candidate with Microsoft CRM experience and willingness to learn from others. The consultant will work in a team environment with responsibility for the on-time, on-budget delivery of multiple customer projects.

Responsibilities:

- Configure and customize CRM application (Microsoft Dynamics CRM, GoldMine, SalesForce and QuoteWerks) based on the customer plan
- Knowledge of programming procedures and programming languages including Visual Basic, Javascript and SQL
- Knowledge of IIS and web technologies
- Develop and test programs and programming modifications; Write testing plans for others to test your work
- Plan and perform data migration into the new systems
- Install applications and configure environments for use in development, testing and production
- Create reports, forms and other deliverables for projects and tickets
- Write and maintain programming and project documentation based on provided specifications
- Provide end-user and system administrator training in on-site and remote formats
- Understands and uses programming and documentation best practices
- Continuously improve knowledge through reading and self-study
- Other duties as assigned by owner

Abilities:

- Experience implementing CRM applications preferred (Microsoft CRM, GoldMine, Salesforce, Saleslogix, etc.)
- Familiar with relational database concepts and SQL
- Self-starter with ability to handle multiple tasks and priorities
- Must have excellent communication and client development skills
- Maintain a positive attitude that promotes team work within the company and a favorable image of the company
- Effectively manage and solve complex problems through problem-solving
- Work cooperatively in a team environment
- Commit to the mission and vision statement of Relevant Automation
- Remain flexible on changing workloads

Working Environment:

- Small office environment
- Constant use of technology and software to achieve efficiency

Education:

- Bachelors Degree in Business Systems or related field
- Microsoft CRM certifications preferred but not required

Experience:

- Minimum of two years experience in CRM implementation, project management, system design or related business experience
- Knowledge and experience with Microsoft CRM greatly preferred
- Knowledge of GoldMine helpful but not required
- Knowledge of other CRM applications helpful